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ABSTRACT

Supporting performance objective 67 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on greeting callers and visitors are included in this packet. (The packet is the fourth in a set of four on performing receptionist activities--CE 016 935-937.) The student materials include two student activities and an instructor's checklist. The instructor's manual includes suggestions for administering the module, a list of materials needed, and the narrative script for a filmstrip. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the four packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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PERFORMING RECEPTIONIST ACTIVITIES
GREET CALLERS AND VISITORS

STUDENT'S MANUAL

Prepared by

Pam Harrison

These materials support
Performance Objective 67 of the
V-TECS Secretarial Catalog

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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GREET CALLERS AND VISITORS

INTRODUCTION

It is the secretary or receptionist's duty to greet visitors and callers when they come to the office. It is, therefore, important that you make them feel as comfortable as possible. Remember, a visitor's first impression of a company is formed by the way he or she is greeted by the receptionist. You will frequently be asked to give directions, make introductions, guide visitors, and handle problems. This activity will teach you the proper procedures for each of these duties. As a result, visitors and callers will feel at ease with you and your company.

ENTERING BEHAVIORS

The student should be able to operate a filmstrip projector and cassette tape recorder. It is suggested that the student should complete Performance Objective 68, Answer the Telephone, and Performance Objective 69, Place Telephone Calls, before working with Performance Objective 67, Greet Callers and Visitors.

OBJECTIVES

Given a situation requiring the greeting of visitors and callers, the student will be able to handle the situation using proper procedures.

TURN TO NEXT PAGE.

LEARNING ACTIVITIES

1 READ Suggested reading from Business English or secretarial procedures book. These pages should be assigned by your teacher.

2 OBTAIN filmstrip presentation from your teacher. Set up projector and view this presentation. Focus on frame 1 and start the tape.

3 COMPLETE Student Activity Sheets I and II. These should be completed in the presence of your teacher or someone appointed by your teacher. Each activity will be rated using the instructor's performance checklist.

STUDENT ACTIVITY SHEET I

SITUATION: You are secretary-receptionist to Ms. Sharon Alexander, Personnel Manager. With the help of a fellow student, your teacher, or someone appointed by your teacher, demonstrate the correct procedure for greeting callers and visitors.

1. Mr. John Jones arrives at 10:15 a.m. for his 10:30 a.m. interview with Ms. Alexander.

2. Mr. Stuart Harrison, Ms. Alexander's boss, arrives to see her without an appointment. Ms. Alexander has asked not to be disturbed. Mr. Harrison states that it is important that he see Ms. Alexander immediately.

If the ratings show acceptable performance, proceed to Student Activity Sheet II. If not, go back and view the filmstrip presentation again. Then proceed to Student Activity Sheet II.

STUDENT ACTIVITY SHEET II

SITUATION: You are receptionist to Mr. Allen Smalls, President of a large swimsuit manufacturing company.
With the help of a fellow student or someone appointed by your teacher, use the correct procedure for greeting callers and visitors in the following situation. Your instructor will rate your performance on the instructor's checklist.

1. Ms. Cynthia Smith comes at 11:60 a.m. for her 10:30 a.m. appointment.

2. Mr. John Dowler comes in at 11:05 a.m. without an appointment and insists on seeing Mr. Smalls. Mr. Dowler is very rude, loud and bossy.

3. Direct Paul Chastain, a foreign salesman, to the conference room on your floor. It is difficult to find for most visitors because of its isolated location.

INSTRUCTOR'S CHECKLIST

PERFORMANCE SCALE

N/A – The skill was not applicable to this situation

Poor – The student can not perform the skill

Fair – The student can perform this skill satisfactorily but requires periodic supervision and/or assistance

Good – The student can perform this skill effectively without assistance and/or supervision

Excellent – The student can perform this skill without supervision and/or assistance with proficiency in speed

ACTIVITY	EVALUATION				
	N/A	POOR	FAIR	GOOD	Excellent
1. Greeted the visitor in a friendly manner					
2. Was courteous					
3. Was helpful to visitor					
4. Learned the visitor's name and used it appropriately					
5. Made the visitor feel at ease					
6. Avoided slang					
7. Used correct grammar					
8. Used a pleasant tone of voice					
9. Showed interest in visitor					

INSTRUCTOR'S CHECKLIST

PERFORMANCE SCALE

N/A – The skill was not applicable to this situation

Poor – The student can not perform the skill

Fair – The student can perform this skill satisfactorily but requires periodic supervision and/or assistance

Good – The student can perform this skill effectively without assistance and/or supervision

Excellent – The student can perform this skill without supervision and/or assistance with proficiency in speed

ACTIVITY	EVALUATION				
	N/A	POOR	FAIR	GOOD	Excellent
10. Directed the visitor to the proper room					
11. Gave clear information					
12. Introduced visitor properly					
13. Maintained company policy					

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GREET CALLERS AND VISITORS

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TO THE TEACHER

This module is designed to be used by one or two students at a time. It can, however, be adapted for class use.

Student Activity Sheets I and II should be rated using the Instructor's Checklist given on pages 5-6 of the Student's Manual. This is a perishable item and should be duplicated for evaluation of each student for each activity.

A narration for the filmstrip is provided for your use in recording the cassette.

MATERIALS NEEDED

Filmstrip projector
Cassette tape recorder
One student to pose as caller

TIME

This is a short module and should take the average student 45-60 minutes to complete.

NARRATION FOR FILMSTRIP

GREETING CALLERS AND VISITORS

OBJECTIVE 67

1. "Hello, Mr. Bensen. How are you today?" (secretary) A receptionist or secretary greets many callers everyday. It is important that the secretary-receptionist make a positive first impression. Normally the secretary is at the desk working busily. Let's look at Judy. (narrator)

2. "It's good to see you, Mrs. Andrews. I'm Judy Laymon. Would you like to take a seat? Mrs. Lyle will be with you soon." (secretary)

3. Judy knows courtesy counts so she smiles to every visitor and always tries to use the caller's name. She has found that people enjoy a friendly greeting. (narrator)

4. "Would you like a cup of coffee this morning?" (secretary) Whenever possible Judy promotes company goodwill. This means she builds public relations so that satisfied customers keep coming back, and new callers get interested. (narrator)

5. If possible, Judy tries to help callers with routine questions and directions. (narrator) "Yes, your balance is $16.58." (secretary)

6. Do you build goodwill when you greet customers? (narrator)

7. It's easy to greet callers and visitors when you put yourself in their position. Let's watch Judy carefully. (narrator)

8. Notice how she listens to the customer by looking directly at her while she is speaking. (narrator)

9. She doesn't interrupt or change the subject. This especially applies when callers are angry. (narrator)

10. She gives prompt and friendly service. This tells the caller she's interested in helping. (narrator) "Would you like a magazine while you're waiting, Mrs. Andrews?" (secretary)

11. Judy notifies Mrs. Lyle that Mrs. Andrews is waiting and then resumes her activities. She does this by depressing the "local" button and dialing Mrs. Lyle's number. (narrator)

12. Meanwhile, Mrs. Andrews is comfortable and at ease. (narrator)

13. When Mrs. Lyle is free, Judy introduces Mrs. Andrews if she is a new client. (narrator) "Mrs. Lyle, this is Mrs. Andrews." (secretary) The receptionist should make the introductions. Remember to use the name of the person with the most importance first. (narrator)

14. If Mrs. Andrews is the president of Three Way Fashions, you would introduce her this way – (narrator) "Mrs. Andrews, this is Mrs. Lyle." (secretary)

15. Sounds easy? Try this. In this situation, you are the receptionist to Mr. Ronald Raycraft, personnel director of ALO Corporation. (narrator)

16. Dr. Grayton from Stanford University has arrived for his one o'clock appointment, how do you introduce them? (narrator)

17. Blank – color slide – 15 seconds

18. Good. "Dr. Grayton, this is Mr. Raycraft." (narrator)

19. If Dr. Grayton is female does it make any difference in the introduction? (narrator)

20. Blank – color slide – 15 seconds

21. No. The rule applies that the name of the person with the most importance is introduced first. Again, "Dr. Grayton, this is Mr. Raycraft." (narrator)

22. Now you're ready to greet callers and visitors. How would you introduce each of the following visitors to your boss, Miss Jones? (narrator)

23. Mr. John Oliver, CPA (narrator)

24. Blank (15 second pause) "Mr. Oliver, this is Miss Jones." (narrator)

25. Ms. Jody Mercy, secret[illegible]arrator)

26. Blank (15 second pause) "Miss Jones, this is Ms. Jody Mercy." (narrator)

27. Dr. Sonja Waring, psychologist. (narrator)

28. Blank (15 second pause) "Dr. Waring, this is Miss Jones." (narrator)